VOLUME 69 ISSUE 5 • SEPTEMBER/OCTOBER 2022

intercom

THE MAGAZINE OF THE SOCIETY FOR TECHNICAL COMMUNICATION

STRATEGIC THINKING FOR TECHNICAL COMMUNICATORS

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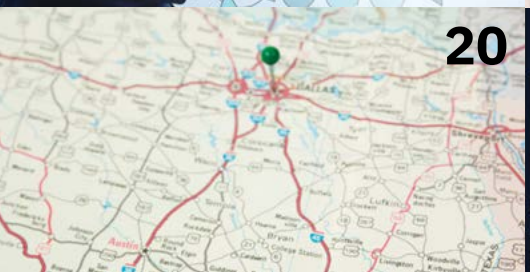

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Intercom Editorial: intercom-editor@stc.org
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Intercom (ISSN 0164-6206) is published 6 times a year by the Society for Technical Communication, 3251 Old Lee Highway, Suite 406, Fairfax, VA 22030, a nonprofit educational organization, as a service to its membership. Membership in STC includes an online subscription to **Intercom.** Periodicals postage paid at Fairfax, VA, and additional offices.
Postmaster Send address changes to **Intercom,** Attn: Membership, c/o Society for Technical Communication, 3251 Old Lee Highway, Suite 406, Fairfax, VA 22030.

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A Note from the Editor

I want to take this opportunity to thank Dr. Liz Herman and Dr. Jackie Damrau for putting together this comprehensive guest-edited issue of *Intercom.* We not only have a full magazine, but also a curated selection of online-only articles that will be open to the public for sharing.

As with everything in STC, *Intercom* would be nothing without the contributions of our authors, columnists, and guest editors. I never cease to be amazed by the talent and generosity of our volunteers who make STC a great professional community. And that makes the perfect segue to the below request from our 2022-2023 President Aiessa Moyna:

What programs and services do you find most useful? What new offerings would you like to see? Please get in touch at board@stc.org! The STC Board of Directors and I would love to know what you think STC is doing well, what we could do better, and how we can support you as a tech comm professional, educator, or student, or as an STC leader.

As a former member of the Board of Directors, I know firsthand that the all-board email is the best way to reach the full board at once. All suggestions are discussed and considered, particularly as we head into 2023 budget-planning season. Reach out and let them know what matters to you. ■

Alisa Bonsignore *(she/her)*

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Statement of Ownership: There were 447 copies of INTERCOM published in September 2021. The average for the preceding 12 months was 424. The paid/requested outside-county mail subscriptions for the September 2021 issue were 403; the average for the preceding 12 months was 378. Total distribution for September 2021 was 407. The average for the preceding 12 months was 384. Eight (8) free copies of INTERCOM were distributed by mail in September 2021 and the average number of free copies distributed during the preceding 12 months was 48. Forty (40) copies of INTERCOM were not distributed in September 2021, and the average number of copies not distributed during the preceding 12 months was 50. The percent paid/requested circulation in September 2021 was 97 percent; for the preceding 12 months, percent paid/requested circulation was 94 percent.

A Note from the Guest Editors

BY DRS. JACKIE DAMRAU AND LIZ HERMAN

The technical communication field is broad in many ways. Technical writing proliferates itself into many different roles in which we provide our expertise. These roles include business process management (BPM), knowledge management (KM), change management (CM), and business strategy. To excel in these areas as technical communicators requires us to adopt strategic thinking patterns. In this issue, we explore the concept of strategic thinking as it relates to you, the technical communicator.

Dr. Jackie Damrau teaches us to change our mindset from technical communicator to strategic thinker in her article "Strategic Thinking Models: An Overview in Knowledge Management, Business Process Management, and Technical Communication." She defines and thoroughly explains BPM from the lens of knowledge management and technical communication and how BPM aligns with strategic thinking.

Continuing the sentiment of shifting mindsets, Theresa Daudier delves more deeply into KM and how it is used to advance strategic initiatives. In "Using Knowledge Management to Advance Strategic Initiatives," Daudier shares how her focus on continuous improvement and a running list of ideas opens opportunities to share knowledge and rapidly improve organizational processes.

Rounding out the KM topic, Judith Glick-Smith writes about "Purpose-Driven Knowledge Management: The Foundation of Holistic Strategic Thinking." Leveraging her expertise in the field, Glick-Smith shares stories from the many organizations for which she worked that serve as cautionary tales of KM initiatives gone wrong.

> **We explore the concept of strategic thinking as it relates to you, the technical communicator.**

Stories are powerful according to Elizabeth Kuehn as evidenced in her article titled "Why Do We Do What We Do? Employing Stories to Share Organizational Knowledge and Culture." Stories are powerful because they follow a similar structure, pack a punch, center around the characters, and have morals. Become a better storyteller yourself after reading Kuehn's article.

In "A Technical Writer's Roadmap to Your Company's Successful Process Certification," Marsha Blackburn and Erin Friday tackle the ever-present questions around software development and quality management system certifications and their value to organizations. Journey with them as they recount their experiences preparing for certification and learn how documentation and leadership support led them to success.

Speaking of success, Ken Schatzke gives content strategists and the broader technical communication community the down-low on business strategy and how to understand the organization's current competitive environment while defining the strategic direction of a content team. He then includes an excellent discussion about prioritization of strategic content initiatives, understanding all too well that we technical communicators often have a lot of ideas.

Any strategic initiative starts with a solid business case and a solid change management plan. Alyssa Fox's article gives you the information you need to write a business case that's bulletproof. Using an enterprise-wide content strategy as the example proposal for the business case, Fox includes step-by-step details including a cost-benefit how-to that you should absolutely save and reference for your next business case. Michelle Gardner's article lays out a change management plan that you can immediately put into practice. Besides a list of CM best practices, Gardner explains the distinct types of change, talks communication strategies, and elegantly ties it all back into strategic thinking, the essential theme of this issue. ■

Strategic Thinking Models: An Overview in Knowledge Management, Business Process Management, and Technical Communication

By Dr. Jackie Damrau | STC Fellow

Strategic thinking is not simple. It requires research, planning, preparation, and communication to ensure that all employees are aligned to achieve that strategy.

Strategic thinking and strategic plans exist in every business from the smallest to the largest. Even freelancers and self-employed must be strategic thinkers and have a strategy plan to be successful. Unless, of course, you've found the pot of gold at the end of the rainbow!

This article will give a brief glimpse into strategic thinking within technical communication and then shows different strategic models used in knowledge management and business process management.

Strategic Thinking within Technical Communication

Giordano[1] authored an informative article about "Integrated Technical Communications: A Strategy for Technical Communicators" for TechWhirl. She related the concept of Integrated Technical Communication (ITC) and the work that a technical communicator goes through to that of a Rubik's cube (Figure 1).

Figure 1. A technical communicator's many roles shown as a Rubik's cube

Strategic thinking within the technical communication (TC) arena requires a mindset change as we, the technical communicators, become the key players in communications programs and other business areas within our companies. Giordano states, "Twenty years ago . . . we were the makers and keeps of procedural documentation . . . These days our jobs are far more complex . . . our actions involve us in developing and influencing a great of customer interactions." She describes the five key drivers for why complexity has entered the TC world:

1. "Users have high expectations for products and are willing to share their (dis)pleasure publicly through social media outlets.
2. Extensive and often far-flung project teams are planning and deploying more complex and integrated products and services.
3. Outlets for user support are more diverse due to the rise of social media and new customer relationship approaches such as user-generated content.
4. Businesses push to be ever more productive with fewer staff and resources, so the professionals in these companies are pressed into service on more fronts than ever before.
5. Our employers are discovering that we understand the customers — both internal and external — very, very well."

Giordano then says that we need to step up and ask strategic questions like:

1. "Why should we enter this market?"
2. "Why do we want to compete here?"
3. "Why do our competitors want to be in this market?"

The answers should lead us to the "how" questions on development, pricing, distribution, and messaging. Which lead to devising the tactical solutions to meet with the strategy.

Giordano then talks about the integrated technical communication (ITC) approach. Her definition, "ITC is the coordination and integration of all technical communication processes, tools, functions, and sources within an organization to convey information and knowledge relevant to optimizing the users' product experience." The main principles behind ITC are:

1. Focusing on increasing the users' understanding and experience.
2. Emphasizing more on integration rather than processes, tools, and functions.

In using ITC, this leaves more room to look "for strategic coherence in our visioning, planning, and execution" of TC activities.

Business process management comes with its own prescribed strategic thinking models and philosophy. Its relationship to technical

communication is that one must know the business processes to understand the technical vision to deliver the overall business strategy.

Business Process Management Requires Strategic Thinking

Business process management (BPM) uses a separate set of models and perspectives for companies when building their strategic plan. Franz & Kirchmer say, "Strategic importance refers to any process that requires a high degree of knowledge intensity and has a high customer impact. These processes are important to an organization's long-term business strategy."[2] When developing a BPM strategy, their suggestion is:

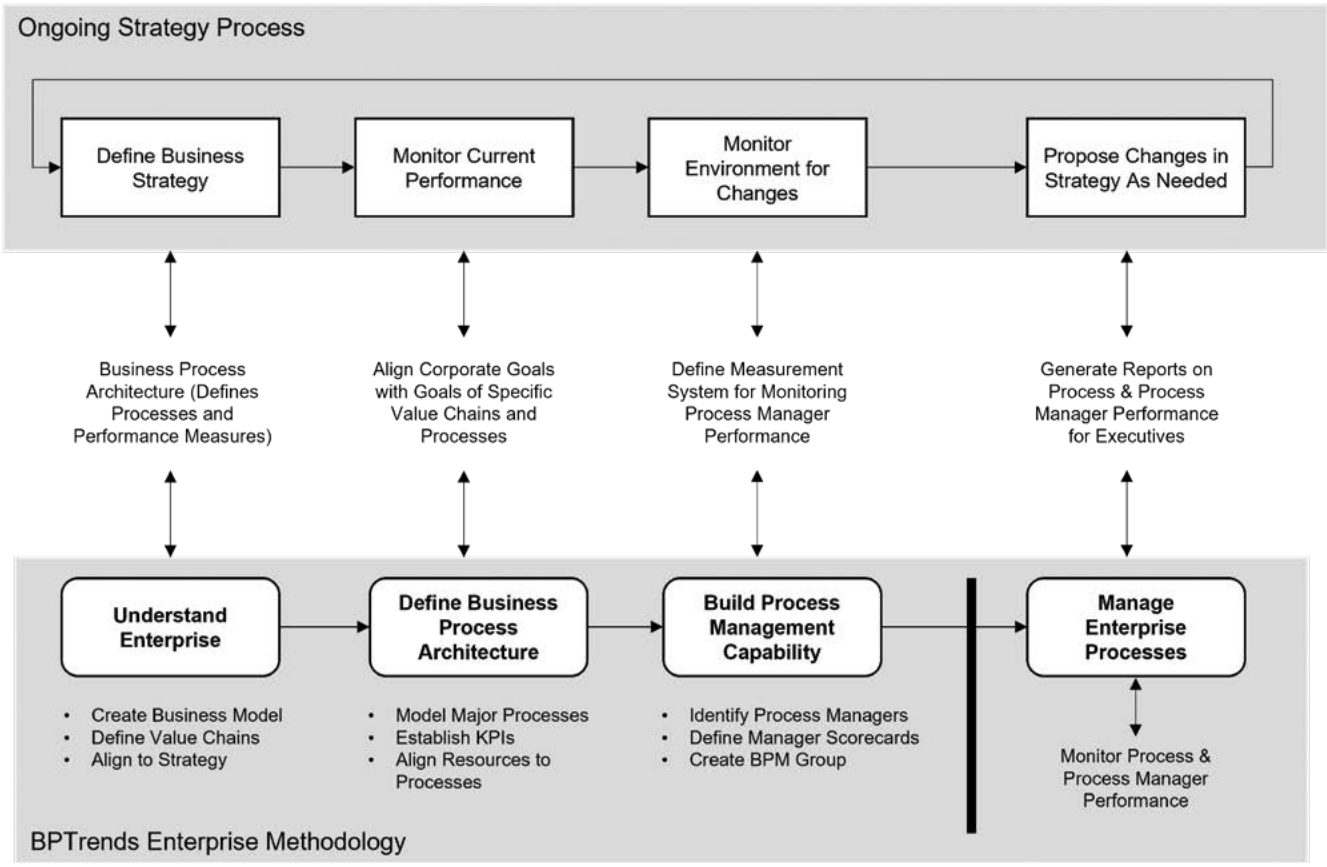
1. Build a *process strategy* that "defines general aspects of a process, including ownership, definition of KPIs, and a framework for measuring how well it is working."
2. Use *process analysis* to "find the most significant opportunities for improvement" based on your roadmap goals.
3. Determine through *process design* how to change the process to meet the improvement objectives.
4. *Implement and execute the process* to watch and monitor the effects or the actual changes to the process improvements and determine to keep or reject them.

Harmon outlines the interactions a company should consider when building their strategy (Figure 2):[3]

When looking at Harmon's model, consider this quote from DAMA International:[4]

"A strategy is a set of choices and decisions that together chart a high-level course of action to achieve high-level goals. In the game of chess, a strategy is a sequenced set of moves to win by checkmate or to survive by stalemate. A strategic *plan* is a high-level course of action to achieve high-level goals."

Orion Development Group states, "Process improvements will not translate into better business results if they do not generate strategic value. That is why the Association for Business


Ongoing Strategy Process
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Business Process Architecture (Defines Processes and Performance Measures)
Align Corporate Goals with Goals of Specific Value Chains and Processes
Define Measurement System for Monitoring Process Manager Performance
Generate Reports on Process & Process Manager Performance for Executives
Understand Enterprise
Define Business Process Architecture
Build Process Management Capability
Manage Enterprise Processes
• Create Business Model
• Define Value Chains
• Align to Strategy
• Model Major Processes
• Establish KPIs
• Align Resources to Processes
• Identify Process Managers
• Define Manager Scorecards
• Create BPM Group
Monitor Process & Process Manager Performance
BPTrends Enterprise Methodology

Figure 2. Harmon's considerations for strategy building

Process Management Professionals (ABPMP) made 'Alignment to Strategy and Goals' the first step in its new BPM Life Cycle" (Figure 3).[5]

Orion Development builds on Harmon's model by agreeing that aligning the business to its strategy and goals is important as the first step. The other phases in the Orion model then follow to help build a strong strategic plan. They further feel that strategic planning and BPM are a two-way relationship where "processes must execute strategy [and] also shape strategy by creating new capabilities and customer value." Companies need to excel at both elements of the strategy-process relationship.

Models are great, yet leadership also needs to be aware of what it takes to look throughout the company for ways of innovating, changing, and building on the great practices already in place and then furthering those practices with new additions. Dr. Al Vicere, Vicere Associates Inc. and the Pennsylvania State University, created the Strategic Leadership Model[6] that "demonstrates how leaders can implement strategic thinking into their leader profile." This model consists of:

1. **Looking Out** at social, demographic, economic, business, and the societal trends that are causing an issue to arise
2. **Looking Around** at competitors, potential competitors, or other benchmark companies that may be seeing the same issue
3. **Looking in the Mirror** to determine what the leadership needs to do to understand the decision, the issue, and make a strategic decision to move forward
4. **Looking to the Team** by communicating to the team the reason for the decision, what it means, and how they can help
5. **Looking for Results** by continually re-engaging the first four steps of the model to continue moving the company forward

The best BPM strategic thinking advice comes from Roger Tregear, a renowned BPM export, who lists the five steps for devising a BPM strategy:[7]

1. *Strategy:* Deliver value to customers and other stakeholders.
2. *Process:* Done through a series of coordinated activities across functional elements of the company.
3. *Process Improvement:* Optimize processes so they satisfy customer and stakeholder requirements.
4. *Process Management:* Develop a performance-coordinated view of the processes by which a company adds value and optimizes performance.
5. *Execution:* Focus on processes that create differentiation in the market described by the strategy.

We've talked about strategic thinking in international technical communication, knowledge management and business process modeling. What strategic thinking strategies can you bring to the table to help your team, department, or company meet their overall objectives?

Conclusion

You can see that strategic thinking is not simple. It requires more research to consider internal and external challenges/pressures; views of the

Figure 3. Orion Development Group's BPM Life Cycle

competition and how they measure up; review of your own processes for continuing, replacing, or eliminating; and building a plan that everyone can get behind. Everyone in this context is not just the company executives; it does need to be shared company-wide so that all employees understand where the company has been, where it wants to go, and that they are a part of the company journey to achieve that strategy.

This article gave a brief glimpse into strategic thinking within technical communication. I'm interested in hearing how you incorporate strategic thinking or what strategic models you use in the knowledge management and business process management areas. ■

Jackie Damrau (jdamrau3@gmail.com) is a Fellow of STC and the Book Review Editor of the *Technical Communication* journal. She is senior business analyst with Cathedral Plumbing in Carrollton, TX, working on the MiView IS product.

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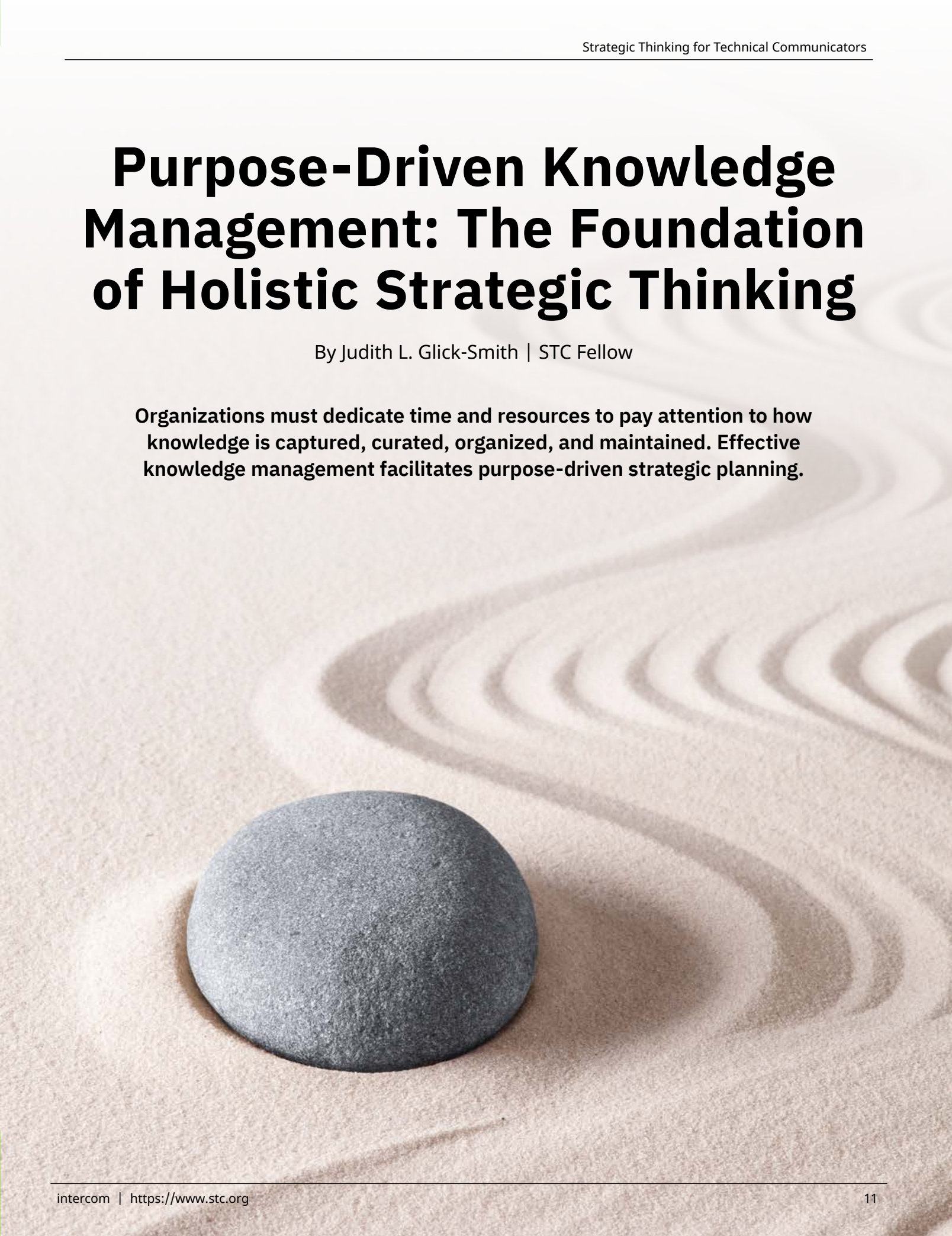
Purpose-Driven Knowledge Management: The Foundation of Holistic Strategic Thinking

By Judith L. Glick-Smith | STC Fellow

Organizations must dedicate time and resources to pay attention to how knowledge is captured, curated, organized, and maintained. Effective knowledge management facilitates purpose-driven strategic planning.



Effective, holistic strategic planning begins with purpose, followed closely by awareness and knowledge, which are foundational to informed decision making. Knowledge is constantly changing and requires a commitment to knowledge management, including knowledge capture, knowledge architecture, processes and procedures, and appropriate technology platforms and systems.

Organizations must dedicate time and resources to pay attention to how knowledge is captured, curated, organized, and maintained. When an unmanaged piece of knowledge fails to get captured, the decision maker can no longer trust the entirety of the knowledge base. Most organizations are in a state of constant re-evaluation of organizational structure and re-allocation of resources due to attrition, the implementation of new technologies, the requirements of customers, and the research and development of new products and service offerings.

In addition, the organization's vision or purpose can change, especially when organizations merge or hire new leadership. When this happens, knowledge that was once relevant and critical to the organization can be suddenly obsolete. Change is fluid, not static. However, if processes are in place at a meta level (not tied to tools, platforms, or people), knowledge required for agile decision making can be managed and exploited.

This article discusses how knowledge management (KM) facilitates purpose-driven strategic planning. Efficient and mindful KM can focus personal and group commitment to provide the most accurate information in the appropriate form that decision makers can use while fully understanding the impact on the people they serve if this is not done well.

What Is 'Knowledge'?

Knowledge is the "why" associated with information. Information is data in context. Tacit knowledge is the knowledge in our heads. It is what enables us to remember how to ride a bicycle. Explicit knowledge is knowledge that has been captured and recorded or written down in some fashion so that others can access it and use it for decision-making.

Purpose-Driven Strategic Planning

The first step in strategic planning must be to identify the organization's vision or purpose. If the vision is to maximize shareholder value, the organization's decision making will be much different than if it wants to focus on support, putting customers first.

Companies, such as Southwest Airlines (SWA),[1] understand that putting employees and corporate culture first results in happy customers. Therefore, their employees and culture are what drives their purpose to "connect people to what's important in their lives through friendly, reliable, low-cost air travel." This ties into SWA's vision "to be the world's most loved, most efficient, and most profitable airline." Succinctly articulating a vision and purpose tells the people in the organization where their focus should be every day.

I recently worked with a company (let's refer to this company as ABC) who required all their new employees and consultants to attend orientation. One of the ABC Senior VPs told the story of a woman who couldn't pay her electric bill because ABC's systems were unavailable. The electric company shut off her electricity the next day. She was on oxygen, which required electricity to run. The VP pointed out that what ABC did every day was to minimize downtime so that ABC's customers — individual human beings — could live their lives with minimal disruption. By putting a human face on the work of the organization, he aligned human resource objectives with that of ABC's purpose. This effectively created a team environment — a feeling that we are all in this together. I never heard anyone say, "That's not my job" or "That isn't the way we do things here." The environment was collaborative and relatively conflict-free. Knowledge was managed in a standardized way and available to those who needed access to it. People worked together to implement systems that helped the support teams do their jobs.

ABC company merged with another company — XYZ. XYZ company had a different culture. They were focused on building shareholder value, rather than on serving the customer. However, this was never articulated or communicated to the everyday worker. The "message" was delivered non-verbally through

upper-management decisions to separate resources into silos fostering a competitive environment as opposed to a collaborative environment; to lay off people who, previously, were key in making sure systems were adequately documented for operations and for audit purposes; to shut off access to systems required for research; by discarding a well-defined and effective development and implementation process because it felt "too slow." Over time, because they rushed, project teams began building systems before they had a design, which meant there was much re-work. A great deal of knowledge was lost on these projects because attrition was accelerating, solution architects were not assigned to individual projects, and engineers were using multiple platforms to capture decisions. I began to hear people complain that "This is not my job" and "Why do we have to do documentation? We never did this before." Because those who left the company, whether voluntarily or involuntarily, were not replaced, those who were left behind became overloaded. Everyone's job got very messy very fast.

Before the merger, technical writing was an integral part of the system development life cycle. However, within two years, XYZ engineers were complaining about having to meet to help technical writers create documentation that operations support could use to maintain the systems. ABC engineers were leaving in droves. The rapidity of this change was stunning. The company will be OK for the next year and a half. However, because they are not replacing the writers or the engineers they have lost, the knowledge base will begin to be out of date. This will bite them when auditors come calling and when there are outages. They will lose customers because of their short-term thinking. This is a pattern I have seen over 40 years of working in the technology sector.

Strategic planning requires an on-going process of continuous re-evaluation, of aligning with purpose, and communicating purpose and plans to those who are doing the work of the organization. People want to know the vision and will align their work to that vision. If the organization does not communicate the vision, people within the organization will make up their own purpose for being, which may not align with the organization's definition of success. The reason for this is that everyone wants to go home at the end of the day feeling as if they have accomplished something worthwhile and that their contribution matters.

The Role of Knowledge in Informed Decision Making

When knowledge is not captured, codified, and made accessible, decision makers will be more susceptible to what Kahneman calls "hindsight bias," sometimes referred to as the "I knew-it-all-the-time" phenomenon. Hindsight bias refers to the inclination to overestimate one's ability to have foreseen the outcome. One tends to minimize the impact of decisions, relegating outcomes as good or bad, rather than whether the decision made sense within the context.[2]

Knowledge provides the basis for decisions. Knowing what has worked in the past helps determine how to proceed. Also, knowing why a specific path wasn't chosen doesn't preclude going down that path now if circumstances have changed. However, if the knowledge around that choice hasn't been captured and made easily accessible, it is easy to repeat the same mistakes, negating the effort to be agile.

Knowledge Management (KM) is a system consisting of people, processes, and architecture. People are responsible for conducting knowledge capture activities; curating the knowledge captured; creating and maintaining the virtual knowledge architecture; creating and following processes and procedures; and building and maintaining appropriate technology platforms and systems. Written standards and procedures, naming conventions, and an agreed upon taxonomy with buy-in from all parties is critical to ensure consistency and accuracy. Even with standards, though, enforcing a consistent process is not simple, unless you have a dedicated person or team to be the focal point for curation, enforcement, and publication.

The architecture is also critical. If an organization is using multiple platforms, effective KM is next to impossible. I've had multiple clients that use multiple "knowledge platforms," such as Confluence, Teams, SharePoint, and ServiceNow for storing knowledge articles and project artifacts. The more platforms an organization uses, the harder

it is to find relevant content that can be trusted to be the most recent and most true. If there is no gatekeeper to maintain these source platforms and people can't find what they are looking for, they will create new documents causing there to be multiple, similar — but not the same — documents about the same subject matter. This is what creates "knowledge graveyards" — a mess that will need to be researched and cleaned up to be useful.

One project I worked on with a large global consulting firm involved multiple SharePoint knowledge bases. SharePoint was their knowledge base platform of choice. However, each department was an organizational silo with its own SharePoint site configured to its needs and not curated to fit within any corporate standard. Anyone within that department could add to the knowledge base to which no other department had access.

The organization had consultants who spent a great deal of time creating documentation — from engagement letters to final reports. They often were able to take an existing document and modify it for their current client. However, when they couldn't find another document that worked in their given situation, they would create a new document from scratch, unnecessarily.

This resulted in an exponential growth in the number of repetitive documents and no way to tell which was the most accurate. The project's purpose was to establish a common taxonomy, consolidate the knowledge bases, delete duplicate documents, consistently tag the remaining documents, and then upgrade SharePoint to the next version. There were over 300,000 documents to review, categorize by document type, and tag with appropriate keywords.

If there had been an explicit set of enforced standards and access to a common knowledge base, each individual consultant could save hours searching for documents and having to create documentation from scratch.

I've been in environments where multiple knowledge architecture solutions dominate, depending on who is in charge. If upper management has always used Confluence, they impose Confluence on their people. If upper management changes and the new regime is used to using SharePoint, the edict will be that everyone needs to now use SharePoint. This is done regardless of any type of requirements analysis or consulting with the people who need to use the system or the size or portability of the existing knowledge base.

Another way multiple knowledge platforms get implemented in organizations is through the "silver bullet mentality" that has dominated software sales for over 40 years. The salesperson arrives in the C-level office and proceeds to convince the senior management team that, "If you buy this platform/software/solution, all your problems will be solved. It's so intuitive that your people don't even have to be trained." I've seen this happen in every sector — private, publicly-held, emergency services, and government. The new solution is implemented, and people are told by upper management, "Here is your new solution. From now on, we are going to use this." Workers then proceed to figure out how to make the new system do what they have always done negating the perceived benefits of the new system.

In the KM world, I've been in multiple organizations where the mandate to use one platform for knowledge storage changed more than three times within a two-year period. No guidance, standards, or enforcement were provided — only a mandate. People didn't know where to put or find project artifacts or support documentation. There was no thought as to how someone would later search for information for use by operations support, by an auditor, or by management for decision-making or planning purposes.

In one client environment, I was in a meeting about a new process where people from multiple departments attended. Confluence was the new, mandated knowledge base, but few people had access to it, and it took weeks to get access. One of the meeting attendees spoke up about having written procedures for documenting projects. He asked to share his screen. He showed the meeting attendees a procedure he had written in Confluence. Most attendees were still using SharePoint and didn't have access to Confluence.

While he was talking, I looked at the organizational chart to see his role. He was a senior manager!

He said, "We need procedures like this." He showed a procedure he had written in Confluence complete with screenshots.

Then, he said, "Any monkey can do this."

Of course, my hackles went up.

I asked him if he was a technical writer. (I knew he wasn't. I just want to point out that he wasn't.)

I asked him if he wrote these procedures.

"Yes," he said.

I asked him who was going to maintain them. He said that he was going to maintain the procedures.

I asked him if he communicated these procedures' existence to those who would need to use them and whether he had granted access to them through Confluence.

"No," he said.

I asked him who would maintain these procedures if he left the company or got hit by a bus.

He said he didn't know.

Then I asked him if he was aware that there was a team of professional technical writers already in place to do this type of technical documentation.

He said, "No."

I pointed him to the manager of the technical writing team. I checked with her later that week; he never contacted her.

This is how "knowledge graveyards" grow weeds and adversely impact strategic decision making.

Conclusion

Organizations who dedicate time and resources to facilitate KM best practices using professional technical communicators who understand how to acquire, curate, and publish knowledge reap the benefits. Every minute an employee or consultant saves by having accurate and true access to knowledge about past decisions is money that goes straight to the organization's bottom line.

Implementing KM is a system development effort that should follow traditional system development life cycle best practices and include the buy-in from all stakeholders. Whether a waterfall approach or an agile approach is used is irrelevant. However, pre-defined requirements are critical before the purchase or adoption of the KM platform.

Professional technical communicators comprise the KM team of gatekeepers and knowledge architects. These professionals are trained in KM practices and need to be the ones to set up and document how the KM system will work, including:

- Articulating, maintaining, and communicating KM standards
- Maintaining the KM taxonomy
- Determining and controlling who has access and who can contribute to the KM system
- Writing, vetting, tagging, and editing knowledge articles

An accurate and current KM system is what facilitates the ability to create dynamic, holistic, and purpose-driven strategic thinking and decision making. ■

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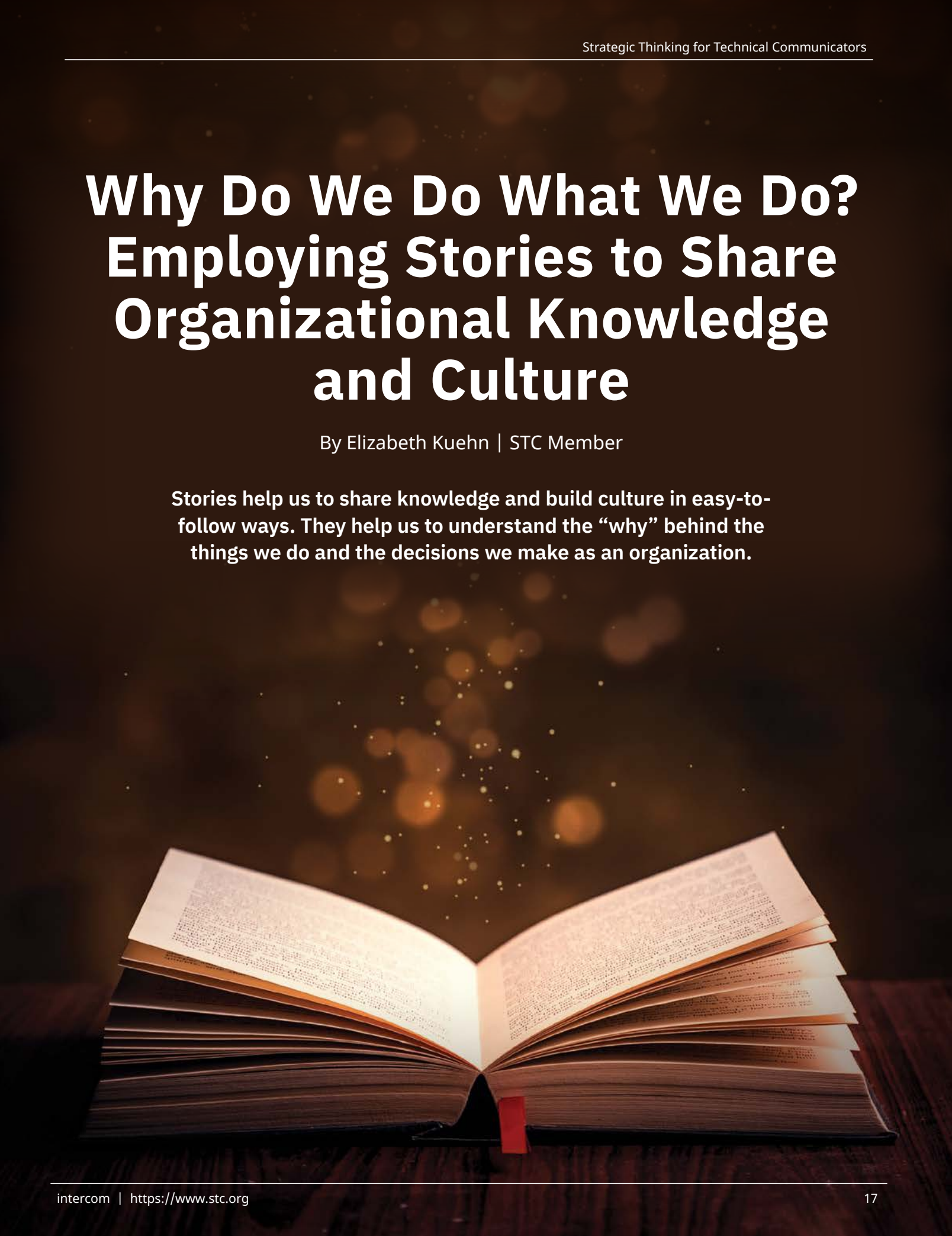
Why Do We Do What We Do? Employing Stories to Share Organizational Knowledge and Culture

By Elizabeth Kuehn | STC Member

Stories help us to share knowledge and build culture in easy-to-follow ways. They help us to understand the "why" behind the things we do and the decisions we make as an organization.



Why Do We Do What We Do?

In my first job out of college, I joined a large, approximately 100-person technical writing team at a fast-growing software company. Each month, my writer friends and I walked across the company's sprawling campus to join the rest of our colleagues in the auditorium for an all-staff meeting. We each grabbed a box of popcorn and a soda on our way in, and then settled into our seats for the morning's proceedings.

These all-staff meetings were often long but always interesting. This was a company with a deep commitment to organizational culture and knowledge sharing; the level of sharing could be described as candid and transparent. In the meetings, we heard about customer successes and failures, about colleagues' triumphs and tragedies, about the company's financial performance, and about changes that were on the horizon. Besides the latest news and updates, the meeting also featured several recurring topics, one of which was titled "Why We Do What We Do."

The why we do what we do (WWDWWD) topic was an opportunity to explain to newer employees and remind more long-tenured employees about the reasons for a particular company policy, practice, or tradition. While our CEO often led this topic, it was just as likely to be led by someone at any level of the organization. Sometimes the tone was deterrent, while other times it was lighthearted, ironic, or even side-splittingly hilarious. For example, a topic might illustrate something like how the company's all-hands-on-deck spirit originated from the team of founders coming together and pulling an all-nighter to land their first client.

Fast-forward to the present. Sitting in an all-staff meeting not too long ago staring at a seemingly endless PowerPoint presentation densely packed with data regarding fourth-quarter earnings and long-term objectives, my mind wandered to consider why I've never felt engaged in this type of meeting in the same way I did back at that first job. The answer came to me almost as soon as the question had entered my mind. . . .

The difference is the stories.

The Power of Stories

Stories have been used by people for centuries to share knowledge and pass pieces of their culture down from one generation to another. The staff meetings at my first job similarly used stories to share knowledge and build culture, all while keeping a room full of employees with extensive to-do lists back at their desks engaged, sometimes even captivated, for three-plus hours each month.

What is it about stories that makes them so powerful?

> **The answer came to me almost as soon as the question had entered my mind . . . The difference is the stories.**

Stories follow a familiar structure. Stories are easy for us to understand because they follow predictable patterns. Since we were small children, we have been exposed to stories in almost all areas of our lives. From the fairy tales we read to our children, to the sitcoms (or even professional wrestling matches) we watch on television, to the phone calls with our mothers sharing all the latest news about the family, we're constantly being inundated with stories. Because we know what to expect with the structure of a story, we can focus all our cognitive attention on the new or novel information that the story is conveying, and we have the mental structures and resources available to easily remember it.

Stories pack a punch. Stories are efficient because they can convey a large amount of information in a small package. A complex concept that normally might take a page or two to explain in detail could potentially be distilled into a punchy, one-paragraph story that gets the same points across.

Stories center around the characters. Stories become personal to us through their characters. The characters add the human element. The more closely we can identify with the characters, their plights and struggles and the obstacles they face, the more likely we are to insert ourselves into the stories we read or listen to. And, as we become more personally invested, we become

more engaged, we pay closer attention, and the story's lasting impact becomes even stronger.

Stories have morals. The moral of the story is the lesson it is designed to teach. The moral might be cautionary, or it might be inspirational or motivational. Positive or negative, it offers a takeaway message for the story's audience. When the takeaway message equates with the most memorable part of the story, the author has hit the sweet spot in crafting a great story. It's been more than 10 years now, but I can still remember many of the WWDWWD lessons.

Why Is the 'Why' Important?

In my staff meeting example, the moral of the story correlates with the "why." The WWDWWD stories examined what lessons employees had learned in the past that altered their course or caused them to adjust their processes or practices. No one wants to be told to do something just because "that's the way we've always done it." If employees understand the "why," they're more likely to make well-informed choices and less likely to repeat the past mistakes. Understanding the why also affords them the opportunity to reevaluate their assumptions and question whether they are still valid in the current context. Perhaps the reason the organization does it this way is obsolete and there's a better way to do things going forward. Employees will never realize this if they don't understand the "why."

> **If employees understand the "why," they're more likely to make well-informed choices and less likely to repeat the past mistakes.**

One key tenet of knowledge management is getting information out of the heads of "experts" and into the hands of others who need it. That's not always an easy task. Oftentimes the knowledge is tacit, and the experts can't easily share it using typical means, like job aids with linear instructions. That's where stories can help. In this context, stories serve almost like "rules of thumb," illustrating a scenario that an employee might face and recommending what to do or not to do to address it.

The Storyteller's Role

As technical communicators, we are well equipped to help our organizations maintain and share their "why" through stories. Many of us have been trained as storytellers, perhaps as journalists, as fiction writers, or as information designers. Even if we haven't, we can familiarize ourselves with the basic storytelling principles and combine those with our familiar principles of clear and effective communication to develop our own stories and to help our colleagues develop their stories.

Teaching about organizational culture and norms is just one example of the way we can employ stories in a business context. And there are many possible avenues to share these stories beyond an all-staff meeting, though that's a great place to start. Other contexts where we might share them include internal social media channels, team blogs or intranet posts, or division meetings. The context that we decide upon will help us to determine whether to share these stories verbally or in writing.

When we're crafting the stories to share within our organizations, it's not always necessary to stick with the facts. Just like in the movies, our stories can be fact, fiction, or "based on a true story." We might find that sharing an allegorical story is more effective at getting our point across. When we venture outside the lines of nonfiction, we just need to be transparent and make sure our audience is aware of our story's "genre."

By adding storytelling to our technical communication toolkit, we can help our organizations preserve and share valuable insights and equip employees with information that helps them do their jobs more effectively. Plus, we might just find that we have fun crafting and sharing the stories along the way. ■

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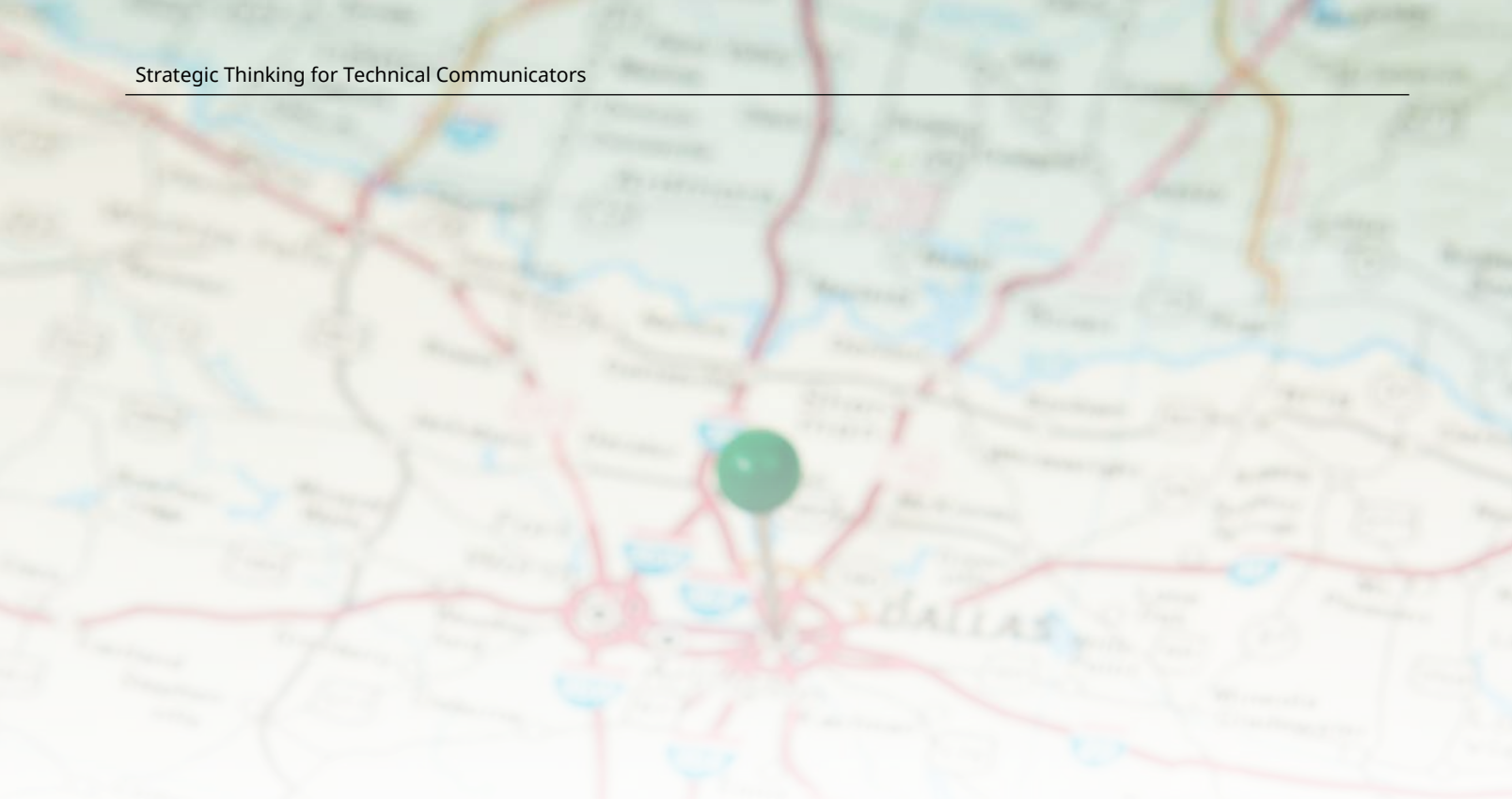

A Technical Writer's Roadmap to Successful Process Certification

By Marsha Blackburn | STC Senior Member
and Erin Friday| STC Senior Member

Few events put the work of technical communicators under a microscope like process certifications and undergoing surveillance audits. They provide an opportunity to assess documentation, identify areas for improvement, and contribute to the highest standard of quality.

Specialized audits and certifications not only validate a company's processes and business practices, but also demonstrate that the leadership, project management, project leaders, developers, and other team members are committed and adhere to the most stringent quality control standards. Such audits and certifications provide an unequivocal seal of approval by the industry and provide validation and assurance that doing business with your company will lead to a successful, productive relationship.

The certification and accreditation that best fit software development are ISO 9001:2015 and Capability Maturity Model Integration (CMMI) Level 3.[1] The International Organization for Standardization (ISO) specifies requirements for a quality management system with a broad focus;[2] CMMI focuses more on process improvement and decreased risk in software,

product, and service delivery. The overlap and differences between the certifications include acquisition of either ISO or CMMI — or, as it was in our case, concurrently — lean heavily on documentation, providing a great opportunity for technical writers and editors to showcase their project work, actively identify and fill gaps in existing documentation, and participate as subject matter experts (SMEs) in the ISO audit and the CMMI appraisal (Figure 1).

The potential payoff for acquiring the certifications is huge: CMMI and ISO help to qualify our division to bid on multi-billion-dollar government-wide acquisition contracts and will help grow our share of information technology-related work for the future. Quality certifications can make up a large percentage of points for some Requests for Proposals (RFPs) and more government contracts are requiring these certifications. These certifications would help our proposals for government projects stand out in a crowded field of contenders by demonstrating a commitment to quality standards.

Few events put the work of technical communicators under a microscope like the process of acquiring quality certifications and undergoing surveillance audits. Quality management plans, deliverables, manuals, standard operating procedures, user guides, project plans — all must withstand multiple days of careful inspection by the ISO auditor or CMMI appraiser.

While documentation is an important underpinning of process architecture, now is not the time to start writing. It is, however, an opportune moment to examine your process model for gaps. The technical communicator adds value to the process in assessing documentation, identifying opportunities for improvement, and contributing to the highest standard of quality.

Our Experience with Acquiring Certifications

In the summer of 2020, an eight-member core team from our division began a deep dive into process architecture as part of the quest to acquire CMMI and ISO certifications in less than eight months. The team was comprised of operations managers, project managers, developers, and technical communicators, all of whom have significant knowledge about our internal processes and process improvement. We also had two external consultant SMEs who guided us on how best to analyze and improve our processes.

Some of our core team members faced distinct disadvantages, including a lack of familiarity with the audit and appraisal processes. We were also still adjusting to working remotely during the pandemic due to closure of our offices and consequently dealing with slow Internet connections, awkward workspaces, and unexpected interruptions and distractions (such as barking dogs, ringing doorbells, and even music lessons taking place in the background). An additional burden for the test-phobic team

Figure 1. The similarities and differences between CMMI and ISO certifications

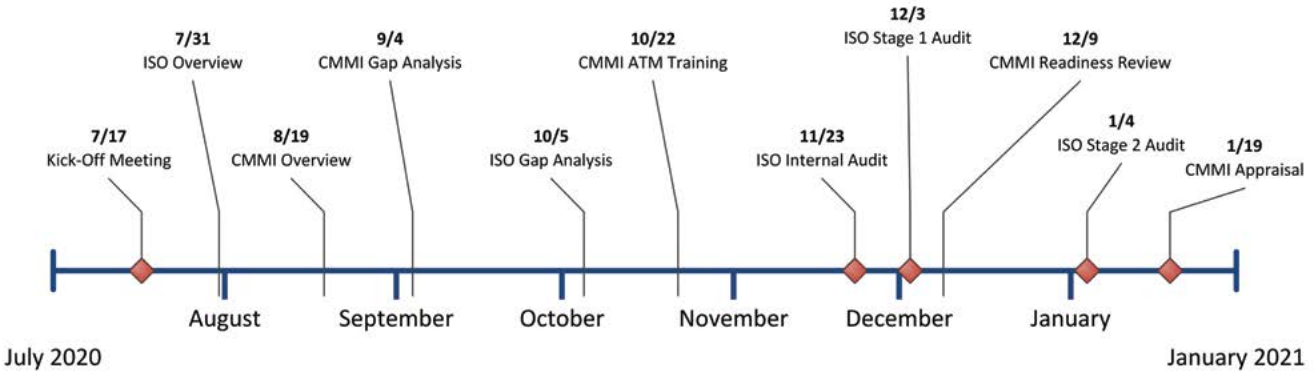

Figure 2. An eight-month timeline for obtaining CMMI and ISO

members was the three-hour CMMI Certified Associate exam, required for all Appraisal Team Member (ATM) participants.

External audits by a third-party firm and internal audits demonstrate the commitment to quality and continually identifying opportunities for improvement. Most companies, including the non-profit research institute where we work in North Carolina, have systems in place to assure quality, but not all companies have it documented to the extent that ISO requires. Internal audits take place quarterly at our company and serve as a test run for the real thing. The internal auditor assesses the risk and effectiveness of processes, identifies opportunities for improvement, and verifies compliance to a standard.

Figure 2 highlights the milestones for how we obtained both CMMI and ISO certifications in less than eight months.

Strategies and Best Practices

Documentation is the key to achieving process certifications. While this article discusses CMMI and ISO specifically, the following documentation will help your company get organized, follow standard processes, and prepare for any other process certifications in the future:

- Quality Management System
- Process maps (such as swimlane diagrams or flowcharts) of your company's current processes
- Standard Operating Procedures of your company's current processes
- Master spreadsheet of all certification requirements and how your company meets each requirement

Quality Management System (QMS)

A QMS is typically a flowchart that illustrates your company's business processes at a high level. It should be aligned with your company's purpose and strategic direction, which most likely focuses on customer satisfaction. The process maps and standard operating procedures describe the details of each QMS step.

Figure 3 is a sample QMS.

Process Maps

Process maps, such as swimlane diagrams or flowcharts, are a simple option for documenting

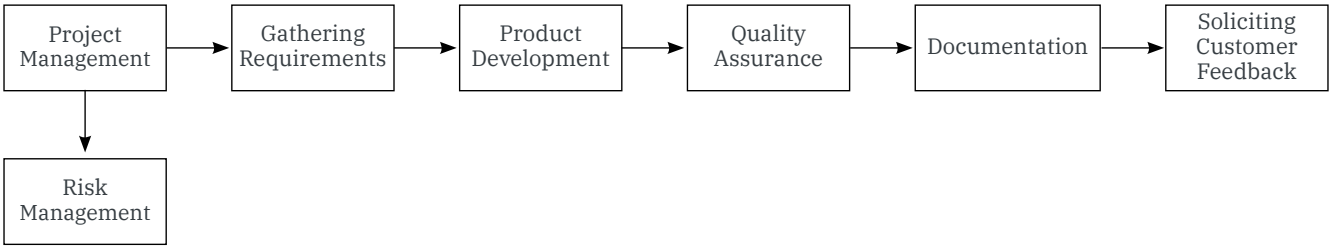

Figure 3. An example of a QMS flowchart

business processes. Swimlane diagrams show the inputs and outputs, the responsible people, and their actions within the process. If more details about the process are needed, then we recommend you create an standard operating procedure for the process (either instead of the process map or in addition to). In the QMS example above, we created only process maps for the gathering requirements, quality assurance, documentation, and soliciting customer feedback steps. The other steps (project management, product development, and risk management) required more details, so a process map and standard operating procedure were created for each.

Figure 4 is a sample documentation process map from the QMS.

Standard Operating Procedures (SOPs)

SOPs can be used in addition to or instead of the process maps. They include similar information to the process maps (responsible people and their actions within the process), but can have additional information, such as a narrative/reasoning about the process, related resources, approval page, etc.

Figure 5 is a sample SOP template.

Master Spreadsheet

The master spreadsheet lists each certification requirement and the document/process that fulfills that requirement. If you are obtaining multiple certifications at once, then add all the requirements into one spreadsheet since many of them overlap. We recommend one module per worksheet.

Figure 6 is a sample master spreadsheet template.

Prepare for the Appraisal/Audit

After creating the documentation described above, we recommend you prepare for the CMMI appraisal and/or the ISO audit by doing the following:

Work with Leadership:

- Obtain leadership endorsement: leadership establishes the purpose of the organization, the business culture, and the strategic direction of the organization.
- Understand how you do business; consider the process certification requirements and understand how they apply to what you are already doing.
- Prepare project leadership for the upcoming appraisal/audit in practice sessions. Some sample questions include:
  - How do your business needs drive QMS activities?
  - How does management ascertain customer satisfaction?
  - How do you determine and provide the resources needed for the establishment, implementation, maintenance, and continual improvement of the QMS?
  - When creating and updating documented information, how do you ensure appropriate identification, format, review, and approval for suitability and adequacy?
  - How does the organization determine the essential requirements for the specific types of products and services to be designed and developed?
- Make the QMS part of the onboarding experience and required training for all employees.

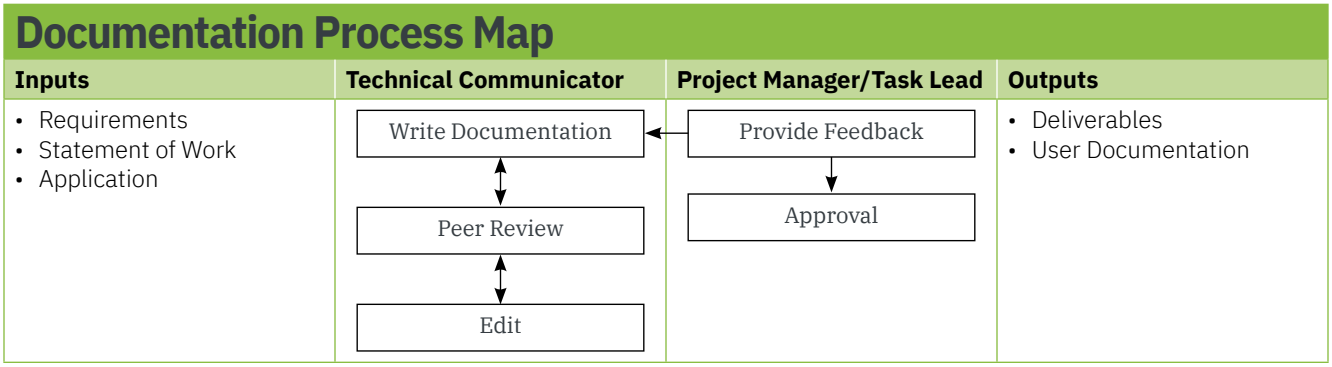

Figure 4. A documentation process map

Workflow
[Using Visio or another flow chart software, create a process flow that visually represents the procedure. A documentation specialist can help with this.]

Overview
[Describe the objective/purpose of this SOP and provide background information that may be relevant to this procedure. The background is a short narrative that gives context to the procedure; for example, when, why, where the procedure is done.]

Definitions
[Identify terms that the reader may not be familiar with and provide definitions. If there are no terms that need to be defined, use "N/A".]

Staff Responsibilities
[List the roles and the responsibilities related to the procedure, including the owner, SMEs, reviewers, documentation specialist, and any other roles that are necessary.]

With respect to this SOP, the following roles and responsibilities apply.
Table 1. Roles and Responsibilities

Role	Responsibility

Procedure
[Use a numbered list to describe the actions necessary to complete the task. Be sure the procedure is detailed enough so that someone without a lot of background knowledge could complete the task and get the expected result.]

Resources
[Add links to additional documents and/or web pages on RCDnet that are related to this SOP.]

Figure 5. SOP template

CMMI Practice Area	Number	ISO 9001 Clause	Number	Responsibility (Org/Project)	Activity/ Process	Artifact	Risk
Develop and update the approach for accomplishing the work	2.1	Operational planning and control	8.1				
Plan for the knowledge & skills needed to perform the work	2.2	Resources – People Competence	7.1.2 7.2				
Based on estimates, develop/update budget & schedule	2.3	Operational planning and control	8.1				
Plan the involvement of stakeholders	2.4	Understanding needs & expectations of interested parties	4.2				
Plan transition to operations & support	2.5	Release of products & services	8.6				
Ensure plans are feasible by reconciling available & estimated resources	2.6	Operational planning and control	8.1				
Develop the project plan	2.7						
Review plans & obtain commitments	2.8						
Use the org's process assets & tailoring guidance to develop, update, & use the project's processes	3.1	QMS and its processes	4.4				

Figure 6. A master spreadsheet template

Ensure Documentation is Ready:

- Use the master spreadsheet to pull up documentation easily.
- Have the final versions of the process maps and SOPs in an easily accessible location.
- Be prepared to have your QMS examined in detail by the auditor.

Conclusion

As Arthur Ashe said, "Success is a journey, not a destination." We achieved our goal of obtaining the CMMI and ISO certifications, but we were truly successful in analyzing and improving our processes, and the entire division is now aware of the benefits of documentation and the skills of technical communicators. The certification process highlighted the effectiveness of our existing processes, taught us how to identify gaps and continually improve, and showcased the visibility and importance of documentation. Ultimately, these certifications will help us win new project work, minimize risk, and improve performance and productivity. ■

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2. International Organization for Standardization (ISO). n.d. https://www.iso.org

Glossary of Terms

Appraisal — The assessment process to obtain the CMMI certification, which involves an external CMMI appraiser asking questions and the ATMs ultimately verifying the certification.

ATM — Appraisal Team Member. Core CMMI team members are required to take ATM training, pass a test, and participate in the CMMI appraisal. The training and exam are required before participating in the CMMI appraisal.

Audit — The assessment process to obtain the ISO certification, which involves an external auditor inspecting all processes and the core team members and project team members using documentation to prove compliance with all ISO standards.

CMMI — Capability Maturity Model Integration. This certification focuses on process improvement and decreased risk in software, product, and service development.

ISO — International Organization for Standardization. ISO specifies requirements for a quality management system with a broad focus.

Practice Area — A module within the CMMI standard that includes varying levels of compliance. For example, Configuration Management, Planning, Peer Reviews, Process Management, etc.

QMS — Quality Management System. This is typically a flowchart that illustrates your company's business processes at a high level.

Business Strategy for Content Strategists

By Ken Schatzke| STC Senior Member

As technical communicators, we know the value we create for organizations, but how do we make others aware of that value? More importantly, how do we unlock that value for our and our employers' benefit? Business strategy can provide answers.

Business strategy has a long history and rich tool set. A Google search for "business strategy" generates over 2 billion hits. These include blog posts, publications, courses, and academic literature. Most of this information pertains to starting new businesses and leading existing ones. As a result, it tends to focus on market positioning, competitor analysis, and building relationships with customers and business partners.

You might wonder if this information is relevant to you. Content strategists and other technical communicators don't have competitors in the traditional sense of the term. Although we occasionally work with contractors and tool vendors, it's not a mainstay of our jobs. So, what can we learn from business strategy?

In fact, we can learn quite a bit.

Content strategists and the broader technical communication community can draw extensively on business strategy. In some cases, we will need to make modifications to business strategy tools to meet our needs, but we can keep the core of those tools intact.

In this article, I'll explore the following business strategy tools and show you how to modify them to work for content strategy:

- Porter's Five Forces
- Strategic direction analysis
- Evaluation and prioritization of initiatives

I first learned about these tools from a LinkedIn Learning course on Strategic Planning Foundations by Mike Figliuolo.[1] If you are a LinkedIn Learning user, I highly recommend this course. I'll conclude the article by explaining next steps you can take with your technical communication team to implement these tools as part of an overall effort to introduce content strategy to your organization.

Analyzing Your Current Content Situation

An important prerequisite of strategic planning is analyzing an organization's current situation. There are several tools available for doing this.

One tool is Porter's Five Forces,[2] which defines five forces that make up an organization's competitive environment:

1. Competitive rivalry
2. Supplier power
3. Buyer power
4. Threat of substitution
5. Threat of new entry

At first glance, Porter's Five Forces don't seem relevant to content strategists. We don't compete in a market in a traditional sense. With some modifications, we can use Porter's Five Forces to analyze our positions within our organizations and our relationships with our organizations' customers.

Table 1 shows the five forces modified for content strategy and questions related to each force that you, as a content strategist, should ask yourself to determine your team's current situation.

Using Porter's Five Forces requires you to ask and answer tough questions. But once you've done so, you can find ways to transform threats into opportunities. For example, if a customer has created a popular blog or YouTube channel about your organization's products, you could partner with the customer to share their content through your organization's channels, share your content through their channels, or both.

Defining a Strategic Direction for Your Team and Its Content

In his LinkedIn Learning course on Strategic Planning Foundations, Figliuolo notes that a strategic direction consists of these elements:

- Mission
- Vision
- Guiding principles
- Goals

More than likely, your organization has established a mission and vision in some form and maintains guiding principles and goals at a corporate level. Your technical communication team might base its short-term goals in part or in

Table 1. Porter's Five Forces

Porter's Force	Alternative for Content Strategy	Related Questions
Competitive rivalry	Internal alternatives	• What other teams in your organization are creating content for customers? • What channels are they delivering this content through? • How is this content received by customers? • Does it complement or compete with content your team creates?
Supplier power	SMEs and other sources of information	• Who provides your team with information? • How reliable are they (both in timing and quality of information)? • What other obligations do they have? • How familiar are they with your organizations' products and customers?
Buyer power	Audience	• Who consumes the content you create? • Do they align with personas you've created for them? • What influence do they have within their own organizations (particularly regarding purchasing decisions)? • How likely are they to use content you create versus other sources of information? • How frequently are they contacting your organization's help desk?
Threat of substitution	External alternatives	• How do customers learn about your organization's products and services and solve problems? • What external alternatives to your content exist, including content created by customers and your organization's business partners? • How popular are these alternatives? • How do these alternatives rank in search results compared to your content? • How does the quality of these alternatives compare to the quality of your content?
Threat of new entry	Platform	• How do the platforms you use (including authoring tools, delivery mechanisms, publishing platforms, and so on) help or hinder the delivery of content to your organization's customers?

whole on the higher-level strategic direction established by your organization. The members of your team likely conduct themselves based on the guiding principles of the organization. However, has your team established its own mission and vision for the content it produces? Is there a benefit to doing so?

Defining a Mission

A mission statement defines why an organization exists. It should reflect the values, beliefs, and philosophy of the organization in a concise form.

Your team can create its own mission statement in line with your organization's corporate mission statement while being specific to the team's function in the organization.

Another way of thinking of a team-specific mission statement is as an elevator pitch (what you say about yourself and your team when communicating with others in the organization beyond "we write documentation").

Defining a Vision

A vision articulates where an organization wants to be in the future. It should be worthwhile, ambitious, and realistic to encourage all members of the organization to strive to realize it.

In his LinkedIn Learning course, Figliuolo recommends a timeline of three to five years for a vision because anything less than three years is too tactical in nature to be visionary and anything beyond five years is too open to change to be planned for in a strategic manner.

A vision for your technical communication team could include the types of deliverables you want to create, how you create those deliverables, the customers you want to support, the countries and languages of those customers, and your team's relationship with the rest of the organization. It can also reflect trends in the broader content strategy and technical communication disciplines.

Using the Mission and Vision as Foundations for Team Goals

Once you establish a team mission and vision, you can set annual goals (both as a team and as individuals) that are in line with the mission and ultimately help you realize the vision.

Figliuolo distinguishes between goals and initiatives. A goal for a technical communication team might be to increase views of documentation compared to calls to the help desk year-over-year by a certain percentage, while an initiative would be a set of specific activities to realize that goal (such as improving the documentation's search engine optimization, redesigning specific sections of the documentation, and so on).

Defining a strategic direction for your technical communication team that aligns with the strategic direction of your organization will help you realize goals and set initiatives for your team and its content.

Evaluating and Prioritizing Initiatives

If you're like most content strategists, you likely have more ideas for your content than time and resources to complete those ideas. With an analysis of your current situation and clearly defined mission, vision, and goals, you can determine which initiatives you should pursue for your content.

Filtering Initiatives

Figliuolo recommends screening initiatives through strategic filters based on the categories in Table 2.

Figliuolo recommends between six and twelve filters. Some will be hard filters (pass or fail). Some will be soft filters (high, medium, low). Possible filters for content strategy and technical communication include:

- Will the initiative increase content usage or reduce calls to the help desk?
- Can the team take on the initiative?
- Can the team take on the initiative using its existing authoring tool and technological platform?

Prioritizing Remaining Initiatives

After filtering out initiatives that aren't strategically beneficial, you next need to prioritize the remaining ones. Prioritize initiatives based on goals. For example, if initiative A increases use of content by 50% and initiative B by only 25%, prioritize initiative A over initiative B. Once this is done, complete a

"drawing the line" exercise based on a limiting factor, such as team capacity or budget.

The end result of this exercise is a portfolio of initiatives that let you meet as many team goals as possible.

Implementation and Continuous Improvement

Once you have a strategy in place and a portfolio of initiatives, you need to implement the initiatives.

Resources should not drive the initiatives you complete, but the other way around. Otherwise, you have created, in Figliuolo's words, "strategy by default." Don't let current limitations in resources drive your content strategy or prevent you from doing new things.

A key element of any kind of strategy, including content strategy, is prioritizing initiatives. Identifying initiatives that will help you realize your objectives will help you implement a content strategy in your team and across your organization.

Rolling Out Business Strategy Tools

After you've identified the initiatives you want to pursue, you need to start projects for those initiatives. You might want to lead these projects yourself or find people in your organization with project management experience and partner with them to lead your projects.

Keep in mind that content strategy, like any other business strategy, is subject to continuous growth and change. You'll need to review your strategy at least once per year and adapt it to changes in your organization, your industry, and the broader discipline of content strategy.

By using business strategy tools like the ones in this article, we can produce real results for us as practitioners and the organizations we work for. ■

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Table 2. Strategic filters

Category	General question for business strategy	Specific question for content strategy
Capabilities	Are the organization's current strengths relevant to the initiative?	Can your team and other content creators take on the initiative with their current knowledge and skillset?
Channels	Can current channels be used for the initiative?	Can you deliver the initiative using your current means for delivering content to customers (corporate website, social media, print, and so on)?
Cost structure/ infrastructure	Is the organization's current infrastructure and budget supportive of the initiative?	Can you take on the initiative using your team's existing budget, capacity, and technological platform (authoring tool, publishing platform, and so on)?
Customers	Do initiatives satisfy the needs of current customers or future customers?	Will the initiative result in content that benefits your users and that they will use?
Competitors	Will initiatives introduce new competitors?	What other avenues for information about your products (both internal and external to your organization) are there, and does the initiative complement or compete with those avenues?

Become a Strategic Partner for Change Management in Your Organization

By Michelle Gardner

The role of technical communicators is evolving. Those skills can be used to support new processes and procedures in an organization.

Chances are you are no stranger to change in the workplace. Maybe new technology is being introduced and you must learn a whole new software program. Perhaps there is new leadership at the helm and they are introducing a plethora of newfangled processes and procedures. Similarly, mergers and acquisitions (M&As) may mean leaving behind familiar ways of working and adjusting to unknown systems and leadership styles.

Few people like change that pushes them out of their comfort zone. Most people, when presented with change of any kind, are reluctant and may feel betrayed or frightened of what's to come. It's not necessarily that the change is bad, but individual interpretations of change can be a stumbling block. Emotions get in the way and without resources to share these emotions, change appears worse in the minds of those affected.

Organizational Change Examples

Harvard Business School says that organizational change can involve changing your company's culture, people, product, infrastructure,

technology, or processes. There may be anywhere from five to twelve common types of organizational change. Adaptive change makes small, incremental adjustments, fine-tuning the system but not transforming it. Transformational change is fast and dramatic. Companies often launch major changes because a serious new challenge has developed.

Most changes are in one of four areas: strategy, structure, process, or people:[1,2]

- **Strategic change** adjusts a company's strategy to achieve its goals or even to change the mission statement in response to external demands. It may involve re-evaluating target markets, how products are sold, or business partnerships.
- **Structural change** involves the hierarchy of authority, goals, administrative procedures, and management systems. The change can be as simple as implementing a no-smoking policy or as involved as restructuring the entire company.
- **Process changes** are geared toward optimum workflow and productivity. They address time lost in repetitive or administrative tasks by implementing automation. The adoption of robotics in manufacturing is another process change example.
- **People changes** alter the behaviors, skills, or performance of employees to change how they solve problems, learn new skills, and perceive their role in the organization. An example is manager training to help them work effectively with their teams.

If you find yourself at ground zero of change management, you are bearing the burden of the who, what, why, and how of the entire process. As a technical communicator, you understand customer requirements, the desired outcome, the tools you have for the job, and when your deliverables are due. In short, you can be a project manager for organizational change. If it's not already in your repertoire, *learn how to think strategically* to expand your role and value as a technical communicator.

> **McKinsey senior partner Harry Robinson said that roughly 70% of corporate transformations fail.[5]**

What Is Strategic Thinking?

Strategic thinking is looking beyond the immediate issue to consider consequences, implications, interdependencies, and indirect effects of your decisions. Where critical thinking is the methodology used in problem solving and decision making, strategic thinking is the activity where critical thinking is the tool.[3]

Strategic thinking in change management is anticipating the consequences and implications of the new processes and procedures you are implementing.

Miles Kimball wrote an article in *Technical Communication* describing a study conducted among technical communication managers.[4] Participants valued basic technical writing skills and traditional credentialing over technical degrees or certifications, yet practitioners need strategic skills to advance their careers. Technical communicators should be smart, well-trained writers, but they can also be participants in determining an organization's strategic goals.

Onward to Change Management

People tend to resist change, but there are approaches and best practices that help calm their fears of leaving their comfort zone and venturing into the unknown.

Explain Why Change Is Taking Place

Creating tools and processes that solve business problems may be the gist of your project, but they can be an imposition on those who must use them. Demanding that your people master new concepts often results in pushback when complexity replaces familiarity. Processes should reduce complexity and improve structure.

As the technical communicator who is helping to spearhead change in your organization, be thorough and clear in explaining why the change is taking place. Create supporting materials and documentation that spell out what initiated the idea for change and why it is important for the company. Is it to achieve digital transformation and cloud-based workflows? Are you introducing automation to help employees be more productive and efficient? Do you need to adapt to the changing habits of your customers?

Get Leadership Buy-In

Successful change management is rooted in buy-in, which is based on solid reasons for change, and it should start from the top. As it filters down through the ranks, the message must remain consistent.

If the coming changes weren't initiated by the highest-level leader(s) in your organization, getting buy-in from leadership is necessary before communicating them to the rest of the organization. Defined goals and benefits of change are imperative to get leadership aligned and to identify other individuals in the organization who can help lead the change. Recruiting other change agents will help in seeking input from those affected by the changes and incorporate their feedback into project iterations.

Communicate and Don't Exclude Anyone

When left to their own devices, people will make assumptions about the changes taking place, rumors will run rampant, and morale will plummet.

To help avoid such negativity, communicate early, often, and with everyone. Let them know how the change will affect them, then provide ongoing status reports of the change process.

Consider how processes and procedural changes in one department directly or indirectly affect other departments and develop a plan that communicates how your company will accommodate these effects. Gather feedback from those affected by capturing their questions and concerns, fears, and insecurities. Knowing what they are thinking and feeling and making them *co-creators in the change process* will go a long way to alleviate tensions and gain their support as change agents.

Explain the New Behaviors Expected

Once you've defined *why* the change is taking place, you should be able to identify new behaviors the organization needs to see during and after implementing the change. Table 1 is an example of the before-and-after or from-to behaviors.

Table 1. Examples of from-to behaviors

From	To
Paper-based processes	Online or automated processes
Data silos[6]	Information sharing and collaboration
Stagnant performance	Offer training to show that employees are valued and encouraged to grow
Stuck in a rut with low morale	Enable employees to view their role in the organization's bigger picture

Provide Training for Everyone

Cultural change is just as important as technological change and when there are new technologies or processes, employees must develop new habits for using the tools. Your technical writing skills will shine here since you'll need to explain what the process is and walk people through its features and functionality.

A combination of written documentation, live and recorded training, and cheat sheets will help transition employees to the new way of working. A pilot group can prove useful here so that you can expand on or clarify the materials for various levels of learning and understanding. Be sure that documentation and training materials are updated when software or platforms release new versions and offer refresher training to make people aware of new features and functionality.

Define Benchmarks for Success

Developing key performance indicators (KPIs) for behavioral change takes work, but they are necessary for driving and measuring the right behavior in your organization. Developing KPIs include:[7]

- Using them to improve performance
- Considering the unintended consequences of a KPI (responding to the KPI instead of hitting its target)
- Getting a holistic understanding of organizational performance
- Improving the process for reaching goals

Consistent behaviors create cultural norms in your organization, which may include:

- Learning and improving instead of comparing and judging
- Encouraging buy-in rather than "signing off"
- Improving through leverage, not force

Best Practices for Change Management

Prosci is a global team of change advocates. Now on their 11th edition of *Best Practices for Change Management*,[8] study participants consistently identify seven factors that impact the results of a change initiative:

1. Mobilize active and visible executive sponsorship
2. Apply a structured change management approach
3. Communicate frequently and openly
4. Engage with front-line employees
5. Dedicate change management resources
6. Engage and integrate with project management
7. Engage with and support middle managers

Having a positive leader who actively and visibly guides the organization through change is the greatest contributor to its success. It was cited four times more frequently than the next contributor to change success.

Conclusion

Whether your organization is big or small, change is inevitable and preparing for change of any kind should be a top priority.

Change management goes deeper than teaching employees how to use a new software application or adapting to corporate restructuring. Clearly stating why change is taking place and getting buy-in from leadership are critical to its success. If leadership doesn't buy in, people throughout the organization won't buy in, and no one will invest the energy to make change happen.

Applying strategic thinking and following best practices for change management will help the process move along so your organization can quickly adopt new behaviors, adapt to the new way of working, and improve their workflow process.

As a technical communicator, you can evolve your role and become a strategic partner for change management in your organization. In the process, you can continue to develop your skills that will help support new processes and procedures. ■

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Career Planning in a Post-Pandemic World

STC is pleased to announce a two-day online seminar focused on your future career plans!

COVID-19 has disrupted where people work, how they work, and sometimes even why they work. The impact of the pandemic was immediate, sparking job loss, work from home, and career reconsiderations. From the Great Resignation to a very competitive candidate market to extensive layoffs, there have been massive swings in what's happening in employment since early 2020.

However, these shifts have provided many opportunities for technical communicators.

Clear and relevant communication is more essential than ever, providing valuable information about healthcare, improving interactions across an increasingly remote workforce, and building trust with audiences.

Attendance at this two-day seminar provides 4 CEUs toward CPTC currency!

When: 3–4 October 2022
Times (both days):

Noon–12:45 PM ET
1:00–1:45 PM ET
2:00–2:45 PM ET
3:00–3:45 PM ET
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For full details and to register, visit **https://www.stc.org/education/online-seminar/** or scan the QR code

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Sessions Sneak Peek

Author Unknown: Marketing Your Documentation, Managing Multiple Projects, And Protecting Your Wellness in A Remote, Start-Up Environment
Speaker: Cheyenna Eversoll Duggan

From In-Person to One Person: Catapulting My Career Forward During a Pandemic
Speaker: Ashley Gordon

Knowledge Management Strategies for the Great Resignation
Speaker: Liz Herman

Remote Interviewing — Finding the Right Fit
Speaker: Suzanne Kelchner

Teach Old Soft Skills New Tricks in a Post-Pandemic World
Speaker: Michael Harvey

Visual Personal Branding
Speaker: Randy Krum

What I Didn't Know I Didn't Know About Freelancing
Speaker: Alisa Bonsignore

Writing for Business Continuity
Speaker: Kelly Smith

Nominations and Donations Now Being Accepted!

BY AIESSA MOYNA, STC PRESIDENT

At this time of year, vacation season winds down, school starts back up, and the STC program year gets under way. That means our Society-level committees are gearing up for a busy few months ahead. If you're not already familiar with these volunteer-driven groups, let me fill you in!

Committees help deliver programs that drive value for our members and other technical communicators. Several more perform a governance function or assist with the Society's behind-the-scenes operations. Still others recognize our STC communities — chapters and Special Interest Groups — for their work on behalf of their members and the overall Society.

Other committees focus on recognizing individuals for their educational and career achievements or for their service to the Society and the broader profession. You can find out more on the STC website.

Nominate Yourself or Someone You Know

Nominations for the honorary ranks of Fellow and Associate Fellow will be due soon, and now is the time to begin preparing the application packets. These honors recognize individuals who have reached a level of achievement in their careers — whether as practitioners or educators — through contributions to the technical communication profession and sustained, significant service to the Society. Full eligibility criteria are posted online, and the committees will be reaching out to candidates who meet the criteria.

In addition, the search for candidates for Society office is under way. During the upcoming elections, we'll vote for a Vice President, Treasurer, two Directors, and two Nominating Committee members. You'll find role descriptions, eligibility criteria, and details on the Elections page on the STC website.

And if you're an STC student member and interested in applying for the Society scholarship, now is the time to start preparing your application packet, including requesting letters of recommendation. You also may be eligible to apply for one of the scholarships sponsored by our STC chapters. Instructions, due dates, and other details are available through the Scholarship Committee page on the STC website.

Support the STC Scholarship

Finally, you can support our students by making a donation to our Student Scholarship Fund. All tax-deductible contributions go to a restricted fund usable only for the scholarship program. Details and directions are online. ■

AIESSA MOYNA (amoyna.stc@gmail.com) is the 2022-2023 president of STC. Her recurring column will provide updates and insights on Board activities and solicit member feedback to guide ongoing decision-making.

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Strategic Thinking: A Next Step in the Academic Conversation

BY THOMAS BARKER

Strategic thinking is a way of interacting with the world based on accomplishments and outcomes. As such, it is crucially important to how technical communicators see their work in organizational contexts. For the academic technical communicator, the term suggests research into human thinking in general, and ways that such thinking impacts our field.

In this column we look at definitions and scholarly trends in strategic communication to provide an overview of the concept and where it came from. Following that, we examine the concept of strategic communication and how it is evolving in the academic conversation to become one of the most powerful and defining concepts of our era. Strategic thinking is the next step in the world of complexity and uncertainty.

What Is Strategic Thinking?

Strategic thinking can be defined by its opposite: operational thinking. Imagine a box. If technical communicators want readers to *use* the box, they think operationally: tasks and step sequences. But if they want users to use the box wisely (and to transfer box usage to others,) they think strategically: context and problem solving.

Operational thinking is inside the box: form, fit, capacity. Strategic thinking is outside the box: sharing, replicating, monetizing. Operational thinking is sometimes seen as the opposite of smart thinking. Operational thinking is cutting the stone; strategic thinking is building the cathedral.

According to Moritz Börnert-Ringleb and Jürgen Wilbert, operational thinking is lower-level thinking. They associate it with kids, a stage of understanding, but one that cannot be applied in hypothetical situations and is still limited to concrete situations.[1] "Formal thinking" or strategic thinking develops later in kids.

Seen in this light, strategic thinking represents our attempts to move forward in an uncertain world, to act once we have mastered processes and products, to take a broader view, to take the next step in our journey.

Foundations of Strategic Thinking

We can credit various disciplines or arenas of human activity for encouraging strategic thinking. Planning, scheming, plotting, psyching, and proposing: all lend themselves to *next step* strategic thinking. To see the key areas where thought lifts its head out of the box, I looked at a list of "best books on strategic thinking."[2]

Here are the areas where we can find the roots of strategic thinking.

- **Game theory.** Game theory — the study of mathematical models of strategic interactions among rational agents[3] — is the basis for theories of investing, economics, evolution, politics, biology, and just about any endeavor where winning and losing play a part. It grows out of mathematical and statistical formulas for winning and losing, for beating the odds of probability.
- **Sports.** As a metaphor for human and business activity, sports has provided foundational concepts for strategic thinking. Lafley's *Playing to Win,* Scott Miller's *Ninety Percent Mental,* and Annie Vernon's *Mind Games* all capitalize on the nexus of psychology, thinking, and training. This perspective emphasizes the mental dimensions to human activity.
- **War.** Robert Greene's *The 33 Strategies of War* clearly sets strategic thinking in the realm of military struggle and conflict and makes ample connections to strategic thinking in everyday life. Sun Tzu's *The Art of War* is also a testament to the growth of strategic thinking during war times. In our times, the aftermath of World War II brought about the disassociation of the self from simple definitions and led to the culture of Irving Goffman's the *Presentation of Self in Everyday Life*, one of the most influential voices of strategic thinking.
- **Psychology.** Psychological theories of behavioralism since the 1950s have focused attention on mental processes and decision-making that fuel strategic thinking in management and marketing. The *Journal of Strategic Studies* is all about strategies of conflict and aggression.
- **Communication.** Books on strategic communication, many built on metaphors from game theory, sports, war, and psychology cover every aspect of daily life, including leadership and change, education, management, marketing, social media, and human resources. Strategic communication dominates the academic conversation in the field of public relations.

Strategic communication is a way of outlining the directions that scholarship is taking in strategic thinking. As we will see, this field is emerging as the principal direction, the *next step* in communication scholarship.

Communicating Strategically

For technical communicators, the developments in thinking strategically in communication hold particular relevance. The *International Journal of Strategic Communication* recently issued a special, very timely, issue on developments in this important field. The discipline of strategic communication is growing, so much so that "strategic communication" has become a common denominator among names for communication programs.

Zerfass et al. look at four approaches to strategic communication:[4]

1. **Focuses on goals.** This approach sees strategic communication as a broad term to signify any kind of goal-oriented communication. The interdisciplinary approach (which includes technical communication) serves to broaden the whole concept, and distinguish it from "lower-case" communication. Lower-case communication is the everyday, how-to-use-the-box approach to meaning making.
2. **Defines organizational actors.** This approach puts companies and organizations in the context of society, with distinct "personalities" at high levels.

Communication defines these companies.

3. **Expresses power dynamics.** This approach sees strategic communication as an alternative to conventional national or international influence and power. The aims of a nation or organization can be supported by strategic commmunication: building alliances, asserting dominance, or influencing outcomes. In this view, operational uses of communication — as in getting things done — is one of the first casualties.
4. **Covers for "public relations."** This approach sees strategic communication as another term for "public relations," a practice often identified with propaganda and the coercive side of opinion and reputation management. We can see how these attitudes might flourish in the era of questionable corporate environmental, accounting, and employment practices.

In this brief essay, we have seen that strategic thinking has grown out of representations of human activity in various areas. These competitive, thought provoking, enjoyable, and terrible events and actions, at the local and global scale point to one thing: they represent the struggle to get it right. Communication's focus on goals, actors, power, and relationships explains what these representations can tell us.

Ansgar Zerfass puts it this way, "Strategic communication researchers hold that the answer to each question lies at least partly in communication strategy, strategy communication, and strategic communication management." He points out that even if much communication wins at a general level, more successful entities, ". . . pay attention to the "right things," and play their cards right — by deliberate plan, emergent pattern, spontaneous intuition, or lucky accident, their **communication has an edge**; it stands out in the competition for attention." [Emphasis added to show the main point.]

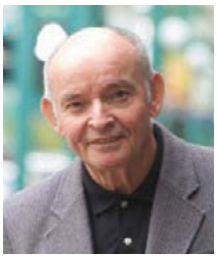
'It's a Process'

Can we take this further? I think we can. Scholars of technical communication can achieve a kind of everyday distinction by helping to figure out how to represent technology, shape user interaction, and make the world more efficient and safer. But by looking at organizations and products through the lens of strategic communication, scholars can develop insights into why some initiatives win and others flop.

Why is strategic communication the key to understanding success and failure? Allow me to illustrate with a scene from one of my favorite moves: *Moneyball.* In that movie the little team (the underdog Oakland A's) beats the big teams (who have all the money), guided by the power of statistics and scheming.

Let's look carefully at what makes the triumph happen. The wins don't really start happening until the strategic thinkers (the general manager and his brainy assistant) step out from the background and start articulating "the game." The protagonist (played by Brad Pitt) explains the strategy to the players themselves. He unleashes the strategy in a montage, the theme of which is "it's a process."[5] At one point he says, "When your enemies are making mistakes don't interrupt them." Pure strategic thinking here.

It's one thing to have heart, but the real win lies in strategy. And by representing goals, processes, and outcomes, strategic communication takes the next step to make it happen. ■



This column focuses on a broad range of practical academic issues from teaching and training to professional concerns, research, and technologies of interest to teachers, students, and researchers. Please send comments and suggestions to column editor Thomas Barker at ttbarker@ualberta.ca.

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A Season of Change

BY AIESSA MOYNA, STC PRESIDENT

September 1 marks the beginning of membership renewal season, and as we look forward to a new year, I want to announce two changes that will take effect for 2023.

***Intercom* Goes Online-Only.** Starting with the first issue of 2023, we will discontinue the print version of the Society's magazine, which will continue as a fully featured online-only publication. As good stewards of STC's financial resources, the staff and Board of Directors made this decision after considering several factors:

- Printing costs are up due to continual increases in the cost of materials and ongoing supply-chain issues.
- Shipping costs are up due to steady increases in the cost of postage and fuel.
- Revenues for *Intercom* are down as sponsors seek ways to stretch limited advertising budgets.
- Individual subscriptions are down as STC members have embraced the convenience and flexibility of the digital versions of the publication (web and PDF). In addition, the overwhelming majority of print copies go to Gold and Sustaining Members, who receive the magazine as part of their benefits package and who don't pay the normal subscription fee.
- Institutional subscriptions have leveled off as colleges and universities increasingly view the magazine primarily as an individual STC member benefit.

In short, the printed version of *Intercom* is losing money, and we don't expect this trend to reverse. Going online-only was the best decision financially, and it has the added benefit of being better for the environment, allowing STC to significantly decrease our consumption of paper and other resources, as well as our carbon footprint. It also will provide more flexibility for our *Intercom* editor, who no longer will have to manage the page count of each issue so closely.

Please note that there are no changes for *Technical Communication*, the Society's journal, which continues to generate revenue — due largely to the subscriptions from academic institutions — and which will continue to offer both digital and print versions.

Membership Dues Keep Up with the Times. For the first time in more than five years, STC is increasing membership dues on 1 September 2022 across most categories, reflecting the increased value of membership over time — including expanded options for professional development, certification, and networking — as well as steadily rising operating expenses. You may know that membership continues to be the single largest source of revenue for the Society. While the increases for 2023 are modest — amounting to less than 10% — they will help to restore and normalize revenues that have declined, especially over the past couple years during the pandemic. The changes do not affect membership categories that previously included a free print version of *Intercom*, nor our Emerging Nation rates. For details about membership categories and rates and to renew your membership for 2023, visit the STC Membership page (https://www.stc.org/membership/).

Do you have questions or feedback related to these changes? If so, please contact board@stc.org to let us know your thoughts and suggestions. ■

AIESSA MOYNA (amoyna.stc@gmail.com) is the 2022-2023 president of STC. Her recurring column will provide updates and insights on Board activities and solicit member feedback to guide ongoing decision-making.

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